

Endpoint Management Asset Inventory Reference

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About This Guide

This *OpenText™ Endpoint Management Asset Inventory Reference* includes information to help you successfully perform inventory tasks. The information in this guide is organized as follows:

- ♦ [Chapter 1, “Overview,” on page 7](#)
- ♦ [Chapter 2, “Scanning Managed Devices,” on page 9](#)
- ♦ [Chapter 3, “Scanning Demographic Data,” on page 21](#)
- ♦ [Chapter 4, “Using Administrator-Defined Fields,” on page 29](#)
- ♦ [Chapter 5, “Using Reports,” on page 33](#)
- ♦ [Chapter 6, “Managing Component Data,” on page 41](#)
- ♦ [Chapter 7, “Managing Product Data,” on page 43](#)
- ♦ [Chapter 8, “Purge Inventory History,” on page 47](#)
- ♦ [Appendix A, “Inventory Workflow,” on page 49](#)

Audience

This guide is intended for Endpoint Management administrators.

Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation.

Additional Documentation

Endpoint Management with Asset Inventory is supported by other documentation (in both PDF and HTML formats) that you can use to learn about and implement the product. For additional documentation, see the [Endpoint Documentation Web site](#).

1 Overview

Endpoint Management Asset Inventory allows you to take an inventory of all the devices in your Management Zone, including data on hardware, software, and demographics.

The following sections contain additional information:

- ♦ [Section 1.1, “Scanning for Hardware Information,” on page 7](#)
- ♦ [Section 1.2, “Scanning for Software Information,” on page 7](#)
- ♦ [Section 1.3, “Scanning for Demographic Information,” on page 7](#)
- ♦ [Section 1.4, “Security Considerations,” on page 8](#)

1.1 Scanning for Hardware Information

Asset Inventory allows you to scan and collect hardware data for all the devices in your Management Zone. The hardware data includes information about keyboard, video adapter, bus adapter, monitor, CD/DVD, LAN adapter, diskette, hard drive, memory module, parallel port, printer, mouse, BIOS, serial port, system board, processor, USB keyboard and USB port. You might also find other categories of hardware components apart from the ones listed. The unrecognized hardware components are listed as Other Hardware in the inventory scan report. You can view the collected hardware data in several ways by using standard and custom reports.

1.2 Scanning for Software Information

Asset Inventory allows you to scan all the devices in your Management Zone and collect data on what software products are installed on those devices. Asset Inventory can identify thousands of products and allows you to define additional products so that they can be recognized on subsequent scans and on other devices. It also allows you to collect data on how many virtual machines are present on the device. Data can be displayed through a variety of reports. This data can be used for general information, license compliance, and so on.

1.3 Scanning for Demographic Information

Asset Inventory allows you to collect demographic information by using:

- ♦ **Collection Data Form:** You can poll workstation users for demographic data, such as name, phone number, department, cost center, and so on. This information is added to the inventory data, giving you a complete picture of all the devices in your Management Zone.

1.4 Security Considerations

No integrity protection is provided for inventory data because it is collected from agents. Because access to inventory data could provide information on how to attack a machine in the Management Zone, Asset Inventory should only be used in a secure environment. In addition, the database where the inventory data is stored should also be protected.

To avoid security threats, Windows managed devices have restricted permissions when accessing network drives for the processes which run in System context. The Endpoint Agent can detect Network drives only with administrator privilege access.

2 Scanning Managed Devices

An inventory scan of your managed devices provides you with a detailed report of each device's hardware, software, and demographic data. The following sections provide information on inventory scans:

- ♦ [Section 2.1, "Configuring an Inventory Scan," on page 9](#)
- ♦ [Section 2.2, "Scheduling an Inventory Scan," on page 12](#)
- ♦ [Section 2.3, "Running an Inventory Scan," on page 15](#)
- ♦ [Section 2.4, "Adding Hardware Products from Endpoint Management Console," on page 16](#)
- ♦ [Section 2.5, "Viewing an Inventory Report for a Managed Device," on page 17](#)
- ♦ [Section 2.6, "Editing a Managed Device's Inventory Data," on page 18](#)

2.1 Configuring an Inventory Scan

An inventory scan allows you to collect data from managed devices in your Management Zone. By default, the inventory settings are preconfigured.

You can define the scan settings at three levels:

- ♦ **Management Zone:** The settings are inherited by all device folders and devices. To configure a scan for the management zone, see [Section 2.1.1, "Configuring a Scan for the Management Zone," on page 9](#).
- ♦ **Device Folder:** The settings are inherited by all devices contained within the folder or its subfolders. Overrides the Management Zone settings. To configure a scan for the devices in a folder, see [Section 2.1.2, "Configuring a Scan for Devices in a Folder," on page 11](#).
- ♦ **Device:** The settings apply only to the device for which they are configured. Overrides the settings at the Management Zone level and the device folder level. To configure a scan for a device, see [Section 2.1.3, "Configuring an Inventory Scan for a Device," on page 12](#).

2.1.1 Configuring a Scan for the Management Zone

- 1 In Endpoint Management Console, click **Configuration**, then in the Management Zone Settings panel, click **Inventory**.
- 2 Click **Inventory** in the category list.
- 3 In the Scan Now panel, configure how to run an on-demand inventory scan by using a Quick Task, device task, or by using the Endpoint Management Icon menu.

For more information on running an on-demand inventory scan, see [Section 2.3, "Running an Inventory Scan," on page 15](#).

Collect Software Applications: Select this option if you want to scan for software applications. This setting is selected by default.

Collect Hotfix Data only using WMI: Select this option if you want to scan for the hotfix information of Windows Management Instrumentation (WMI) only. You can run the `Get-Hotfix` PowerShell command to view the WMI hotfix information on your local machine.

NOTE:

- ♦ After enabling the **Collect Hotfix Data only using WMI** option, you must refresh the Endpoint Agent.

Collect Hardware: Select this option if you want to scan for hardware data. This setting is selected by default.

Launch Collection Data Form: Select this option if you want to send out the Collection Data Form, which is used to collect demographic data. For more information, see [Chapter 3, “Scanning Demographic Data,”](#) on page 21.

Run DMTF Translator: Select this option if you want to run the DMTF (Desktop Management Task Force) Translator. The DMTF translator converts the inventory data to formats that can be used by other tools and puts it on the local machine.

User Can Initiate Scan: Select this option if you want to allow the workstation user to initiate a scan by using the Endpoint Management Icon.

Collect MSI Information: Select this option if you want to scan for information about the installed Microsoft Installer (MSI) files that are used for installation, storage, and removal of programs on a device.

- 4 In the **First Scan** panel, configure how you want to run an initial inventory scan on a device.

Collect Software Applications: Select this option if you want to scan for software applications. This setting is selected by default.

Collect Hotfix Data only using WMI: Select this option if you want to scan for the hotfix information of Windows Management Instrumentation (WMI) only. You can run the `Get-Hotfix` PowerShell command to view the WMI hotfix information on your local machine.

NOTE:

- ♦ After enabling the **Collect Hotfix Data only using WMI** option, you must refresh the Endpoint Agent.

Collect Hardware: Select this option if you want to scan for hardware data. This setting is selected by default.

Launch Collection Data Form: Select this option if you want to send out the Collection Data Form, which is used to collect demographic data, when a scan is initiated. For more information, see [Chapter 3, “Scanning Demographic Data,”](#) on page 21.

Run DMTF Translator: Select this option if you want to run the DMTF (Desktop Management Task Force) Translator. The DMTF translator converts the inventory data to formats that can be used by other tools and puts it on the local machine.

Collect MSI Information: Select this option if you want to scan for information about the installed Microsoft Installer (MSI) files that are used for installation, storage, and removal of programs on a device.

- 5 In the **Recurring Scan** panel, configure how you want to run scans based on a schedule.

Collect Software Applications: Select this option if you want to scan for software applications. This setting is selected by default.

Collect Hotfix Data only using WMI: Select this option if you want to scan for the hotfix information of Windows Management Instrumentation (WMI) only. You can run the `Get-Hotfix` PowerShell command to view the WMI hotfix information on your local machine.

NOTE:

- ♦ After enabling the **Collect Hotfix Data only using WMI** option, you must refresh the Endpoint Agent.

Collect Hardware: Select this option if you want to scan for hardware data. This setting is selected by default.

Launch Collection Data Form: Select this option if you want to send out the Collection Data Form, which is used to collect demographic data. For more information, see [Chapter 3, “Scanning Demographic Data,”](#) on page 21.

Run DMTF Translator: Select this option if you want to run the DMTF (Desktop Management Task Force) Translator. The DMTF translator converts the inventory data to formats that can be used by other tools and puts it on the local machine.

Collect MSI Information: Select this option if you want to scan for information about the installed Microsoft Installer (MSI) files that are used for installation, storage, and removal of programs on a device.

- 6 In the Software Applications panel, configure which directories to skip.

Skipping directories is useful in limiting the scope of the scan. Any entry added to the list skips that directory and all the subdirectories below it.

- ♦ To add a directory, specify a directory in the **Skip Directories** field, then click **Add**.
- ♦ To edit an existing directory, select the directory, click **Edit**, edit the directory, then click **OK**.
- ♦ To delete an existing directory, select the directory, then click **Remove**.

- 7 Click **Apply** or **OK**.

2.1.2 Configuring a Scan for Devices in a Folder

- 1 In Endpoint Management Console, click the **Devices** tab, then click the **Managed** tab.
- 2 Click **Details** next to the folder containing the devices you want to configure a scan for.
- 3 Click the **Settings** tab.
- 4 In the Settings panel, click **Inventory**.
- 5 In the **Catalog** list, click **Inventory**.
- 6 In the Inventory panel, click **Override settings**.

This overrides the Management Zone settings for these devices.

- 7 In the Scan Now panel, configure how to run an inventory scan.

For configuring an inventory scan, perform steps listed in [Section 2.1, “Configuring an Inventory Scan,”](#) on page 9.

2.1.3 Configuring an Inventory Scan for a Device

- 1 In Endpoint Management Console, click **Devices**, then click the **Managed** tab.
- 2 Click the folder containing the device you want to configure a scan for.
- 3 Click the device.
- 4 Click the **Settings** tab.
- 5 In the Settings panel, click **Inventory**.
- 6 In the **Catalog** list, click **Inventory**.
- 7 In the Inventory panel, click **Override settings**.

This overrides the Management Zone and folder settings for this device.

- 8 In the Scan Now panel, configure how to run an inventory scan.

For configuring an inventory scan, perform the steps listed in [Section 2.1, “Configuring an Inventory Scan,” on page 9](#).

2.2 Scheduling an Inventory Scan

This section shows you how to schedule an inventory scan. By default, the inventory schedule is already configured.

You can define the scan schedule settings at three levels:

- ♦ **Management Zone:** The settings are inherited by all device folders and devices. To schedule a scan for the Management Zone, see [Section 2.2.1, “Configuring an Inventory Scan Schedule for the Management Zone,” on page 12](#).
- ♦ **Device Folder:** The settings are inherited by all devices contained within the folder or its subfolders. Overrides the Management Zone settings. To schedule a scan for devices in a folder, see [Section 2.2.2, “Configuring an Inventory Scan Schedule for Devices in a Folder,” on page 15](#).
- ♦ **Device:** The settings apply only to the device for which they are configured. Overrides the settings at the Management Zone level and device folder level. To schedule a scan for a device, see [Section 2.2.3, “Configuring an Inventory Scan Schedule for a Device,” on page 15](#).

2.2.1 Configuring an Inventory Scan Schedule for the Management Zone

- 1 In Endpoint Management Console, click **Configuration**, then in the Management Zone Settings panel, click **Inventory**.
- 2 Click **Inventory Schedule** in the category list.
- 3 In the **Schedule Type** field, select the type of schedule you want to use.
 - No Schedule:** No scan is scheduled. See [“No Schedule” on page 13](#).
 - Date Specific:** Scans run on specified dates. See [“Date Specific” on page 13](#).
 - Recurring:** Scans run on a recurring schedule. See [“Recurring” on page 13](#).

Perform full scan after imaging a device

Select the check box to perform a full scan after imaging the device.

No Schedule

- 1 Select **No Schedule** in the **Schedule Type** field.
- 2 Click **Apply** or **OK**.

No automatic scans are configured.

Date Specific

- 1 Select **Date Specific** in the **Schedule Type** field.
- 2 Click the + icon to the right of the **Start Date(s)** field to open a calendar, then select a date. To select more than one date, click the + icon again. Click the - icon to delete a selected date.
- 3 (Optional) Select **Run event every year** to run a scan annually on the dates you selected.
- 4 (Optional) For some reason, if the event does not run on the schedule you configured, to trigger the event immediately, select **Process immediately if device unable to execute on schedule**.
- 5 Select whether you want the scan to start at a specified time or at a random time between a specified start and end time.
- 6 Specify a start time, and if you selected **Start at a random time between Start Time and End Time**, specify an end time.
- 7 (Optional) Select **Use Coordinated Universal Time (UTC)**. Recommended, if the management zone is across geographical locations.
- 8 Click **Apply** or **OK**.

Recurring

Select whether you want the scan to run when a device is refreshed, on certain days of the week, monthly, or at a fixed interval.

To run a scan when a device is refreshed:

- 1 Select **Recurring** in the **Schedule Type** field.
- 2 Select **When a device is refreshed**.
- 3 (Optional) If you want the scan to be delayed for a set time after a refresh, select **Delay execution after refresh** and specify the time in days, hours, and minutes.
- 4 Click **Apply** or **OK**.

To run a scan on certain days of the week:

- 1 Select **Recurring** in the **Schedule Type** field.
- 2 Select **Days of the week**.
- 3 Select the days on which you want the scan to run.
- 4 In the **Start Time** field, specify the time you want the scan to start.
- 5 Click **More Options**.

- 6 (Optional) For some reason, if the event does not run on the schedule you configured, to trigger the event immediately, select **Process immediately if device unable to execute on schedule**.
- 7 (Optional) Select **Use Coordinated Universal Time (UTC)**. Recommended, if the management zone is across geographical locations.
- 8 (Optional) If you want the scan to start randomly between a specified start and end time, select **Start at a random time between Start Time and End Time**, then specify an end time.
- 9 (Optional) If you want to restrict the scan to a certain date range, select **Restrict schedule execution to the following date range**, then specify the start and end dates.
- 10 Click **Apply** or **OK**.

To run a scan monthly:

- 1 Select **Recurring** in the **Schedule Type** field.
- 2 Select **Monthly**.
- 3 Select either **Day of the month** and specify a number between 1 and 31, **Last day of the month**, or select the configurable field where you can choose a combination of days of the month for a recurring scan.
- 4 In the **Start Time** field, specify the time you want the scan to start.
- 5 Click **More Options**.
- 6 (Optional) For some reason, if the event does not run on the schedule you configured, to trigger the event immediately, select **Process immediately if device unable to execute on schedule**.
- 7 (Optional) Select **Use Coordinated Universal Time (UTC)**. Recommended, if the management zone is across geographical locations.
- 8 (Optional) If you want the scan to start randomly between a specified start and end time, select **Start at a random time between Start Time and End Time**, then specify an end time.
- 9 (Optional) If you want to restrict the scan to a certain date range, select **Restrict schedule execution to the following date range**, then specify the start and end dates.
- 10 Click **Apply** or **OK**.

To run a scan at a fixed interval:

- 1 Select **Recurring** in the **Schedule Type** field.
- 2 Select **Fixed Interval**.
- 3 Specify the number of months, weeks, days, hours, and minutes in their respective fields.

NOTE:

- ♦ If a Satellite with Collection role is configured in the Management Zone, ensure that the scan interval is set such that the scan schedule is less frequent than the **Collection Roll-Up Schedule**.
 - ♦ Currently, **When a device is refreshed** Schedule Type is not effective for Inventory Scans.
-

- 4 Specify a start date by clicking the calendar icon and selecting a date.
- 5 In the **Start Time** field, specify the time you want the scan to start.
- 6 Click **More Options**.
- 7 (Optional) For some reason, if the event does not run on the schedule you configured, to trigger the event immediately, select **Process immediately if device unable to execute on schedule**.

- 8 (Optional) Select **Use Coordinated Universal Time (UTC)**. Recommended, if the management zone is across geographical locations.
- 9 (Optional) If you want to restrict the scan to a certain date range, select **Restrict schedule execution to the following date range**, then specify an end date and end time.
- 10 Click **Apply** or **OK**.

2.2.2 Configuring an Inventory Scan Schedule for Devices in a Folder

- 1 In Endpoint Management Console, click **Devices**, then click the **Managed** tab.
- 2 Click **Details** next to the folder containing the devices you want to configure an inventory scan schedule for.
- 3 Click the **Settings** tab.
- 4 In the Settings panel, click **Inventory**.
- 5 In the **Settings** list, click **Inventory Schedule**.
- 6 In the Inventory Schedule panel, click **Override settings**.
This overrides the Management Zone settings for these devices.
- 7 In the **Schedule Type** field, configure the schedule you want to use.
For configuring the schedule type, perform the steps listed in [Section 2.2.1, “Configuring an Inventory Scan Schedule for the Management Zone,”](#) on page 12.

2.2.3 Configuring an Inventory Scan Schedule for a Device

- 1 In Endpoint Management Console, click **Devices**, then click the **Managed** tab.
- 2 Click the folder containing the device you want to configure an inventory scan schedule for.
- 3 Click the device.
- 4 Click the **Settings** tab.
- 5 In the Settings panel, click **Inventory**.
- 6 In the **Settings** list, click **Inventory Schedule**.
- 7 In the Inventory Schedule panel, click **Override settings**.
This overrides the Management Zone and folder settings for this device.
- 8 In the **Schedule Type** field, configure the schedule you want to use.
For configuring the schedule type, perform the steps listed in [Section 2.2.1, “Configuring an Inventory Scan Schedule for the Management Zone,”](#) on page 12.

2.3 Running an Inventory Scan

You can run a scan four different ways:

- ♦ Using a device Quick Task
- ♦ Using a device task
- ♦ Using the Endpoint Management Icon menu (this runs a scan of the local machine only)
- ♦ Using a schedule

To run an inventory scan using a Quick Task:

- 1 In Endpoint Management Console, click **Devices**, then click the **Managed** tab.
- 2 Click the folder with the desired device(s) and select one or more devices that you want to inventory.
- 3 Click **Quick Tasks > Inventory Scan**.
- 4 In the **Inventory Scan** dialog box, select the preferred scan type
 - ♦ **Differential Inventory Scan:** Performs an inventory scan on the selected devices. This scan uploads only the differential data since the last scan to the server.
 - ♦ **Complete Inventory Scan:** Performs a complete scan on the selected devices. This scan uploads the entire scan data to the server.

The latest inventory scan data will be uploaded to the server as per the upload schedule set by the administrator.

To run an inventory scan using a device task:

- 1 In Endpoint Management Console, click **Devices**, then click the **Managed** tab.
- 2 Open the folder with the desired device and click the device.
- 3 In the device tasks panel, click **Server Inventory Scan** if it's a server; click **Workstation Inventory Scan** if it's a workstation.

To run an inventory scan using the Endpoint Management Icon menu:

NOTE: This feature is only available if the **User Can Initiate Scan** option is selected on the Inventory configuration page. For more information, see [Section 2.1, "Configuring an Inventory Scan," on page 9](#).

- 1 Right-click the Endpoint Management Icon and select **Show Properties**.
- 2 Click **Inventory**.
- 3 Click **Scan Now**.
- 4 (Optional) Click **Refresh Page** to update scan times.

To run an inventory scan by using a schedule, see [Section 2.2, "Scheduling an Inventory Scan," on page 12](#).

2.4 Adding Hardware Products from Endpoint Management Console

In Endpoint Management Console, you can manually add a hardware product for a device if the hardware product has not been reported in the Inventory Report after the Inventory scan. You can add a hardware product in Endpoint Management Console, to map it with specific devices for tracking and easy usage. For example, mapping a specific printer to a specific device.

To manually add a hardware to a device:

- 1 Log in to Endpoint Management Console. Click **Devices** and then **Workstations**.
- 2 Select any of the workstations, then click the **Inventory** tab.

- 3 Click Detailed Hardware/Software Inventory.
- 4 Scroll down and click Add Hardware.
- 5 On the Add Hardware page, select the required hardware product from the hardware products listed in the drop-down.
- 6 Fill in the required details for the selected hardware product, then click Submit.

The hardware products added to the device are displayed in the Hardware section of the Inventory report except Logical Drive and Network Driver. These are listed separately under the respective sections in the Inventory report.

Only the hardware products that are added manually to the device from Endpoint Management Console should have the delete and edit option on the Add Hardware page. To delete from the database the hardware product that is added to the device from the server, click Delete. To edit the hardware product that is added to the device from Endpoint Management Console, click Edit.

2.5 Viewing an Inventory Report for a Managed Device

A device's inventory includes information on hardware, software, and demographic data, which is gathered in an inventory scan. You can view this report through Endpoint Management Console or by using the Endpoint Management Icon menu. To view the Detailed Hardware/Software Inventory report, enable the **View Detailed Inventory** rights setting from the Management Zone > **Device rights**.

- [Section 2.5.1, "Using Endpoint Management Console to View a Managed Device's Inventory," on page 17](#)
- [Section 2.5.2, "Using the Endpoint Management Icon Menu to View a Managed Device's Inventory," on page 18](#)

2.5.1 Using Endpoint Management Console to View a Managed Device's Inventory

- 1 In Endpoint Management Console, click **Devices**.
- 2 Click the **Managed** tab.
- 3 Click the folder containing the device you want to view the inventory for.
- 4 Click the desired device.
- 5 Click the **Inventory** tab.

The **Summary** panel shows basic inventory information.

- 6 Click **Detailed Hardware/Software Inventory** for a complete inventory report.

This report shows detailed information about the device, including demographic data, hardware information, and software. From this page, you can click the various links to get more detailed information about the device.

You can click a tab to view the details for various options such as Hardware, Software, Metro Apps, and other options.

Click **Software** tab to view the detail information of the softwares. While viewing the Software related detail information, you might find two or more instances of same software. This happens as these are from two different path. If the .exe is available in two or more different paths, then the software instance is displayed for each path/ location as shown in the following image:

opentext® Core Endpoint Management 25.1									
Software Manufacturer	Product	Serial Number	Category	Subcategory	Fingerprint	Add/Remove Programs	M		
Igor Pavlov	7-Zip 24.08(C:\PROGRAM FILES\7-ZIP)		Utility	Data Compress.	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Igor Pavlov	7-Zip 24.08(C:\PROGRAM FILES\7-ZIP)		Utility	Data Compress.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Microsoft	Access 2019.16(C:\PROGRAM FILES (X86)\...\OFFICE16)		Database	DB Managers	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Microsoft	Access 2019.16(C:\PROGRAM FILES (X86)\...\OFFICE16)		Database	DB Managers	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Microsoft Corporation	AppInstaller 1.0.190125001-AppClickHandler(C:\USERS\...\MICROSOFT.DESKTOPAPPINSTALLER_1.0.30251.0_X64_8WEKYB3D88BWE)		Utility	Other	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Microsoft Corporation	AppInstaller 1.0.190125001-AppClickHandler(C:\PROGRAM FILES\...\MICROSOFT.DESKTOPAPPINSTALLER_1.0.30251.0_X64_8WEKYB3D88BWE)		Utility	Other	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Microsoft Corporation	AppInstaller 1.24.25200.0(C:\PROGRAM FILES\...\MICROSOFT.DESKTOPAPPINSTALLER_1.24.25200.0_X64_8WEKYB3D88BWE)		Utility	Other	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

You can click the product detail for the software to view the complete path.

Check the **History** tab, to view the changes made on the device. The software or hardware creation dates are based on the scan file processed on the server. If you have set a weekly scan on the device for a certain day of the week, the change history shows the changes made between two successive scans, with the date the scan is run. Only hotfix components show the actual install date for the particular device.

You can export the report to Excel, CSV, or PDF formats. You can also edit selected data. For more information, see [Section 2.6, “Editing a Managed Device’s Inventory Data,” on page 18](#).

2.5.2 Using the Endpoint Management Icon Menu to View a Managed Device’s Inventory

- 1 Right-click the Endpoint Management icon and select **Show Properties**.
- 2 Click **Inventory**.
- 3 Click **View Inventory Details**.

2.6 Editing a Managed Device’s Inventory Data

To edit the Detailed Hardware/Software Inventory report, you should enable the **Modify** setting on the View Detailed Inventory rights page from the Management Zone > **Device rights**.

- 1 Open the Detailed Hardware/Software Inventory report as shown in [Section 2.5, “Viewing an Inventory Report for a Managed Device,” on page 17](#).
- 2 Click **Edit**.
- 3 Add or edit information on the Edit Workstation page.

User: Basic information about the user, including name, phone, and so on.

Reference: Inventory type, serial number, and asset tag. These values cannot be changed.

Workstation: Basic information about the workstation, including site, department, and so on. Click the icon on the right to create a list of responses. Click the calendar icon next to the **Lease Expiration Date** field to choose a date.

4 Click **Submit**.

The data is added to the inventory report.

3 Scanning Demographic Data

Inventory scans include demographic data that is gathered from workstation users through the use of the Collection Data Form. The Collection Data Form can be sent to a workstation user's computer with a prompt to fill out the data fields on the form. This data is then added to the inventory report for that workstation. This section includes the following topics:

- ♦ [Section 3.1, "Configuring the Collection Data Form," on page 21](#)
- ♦ [Section 3.2, "Deploying the Collection Data Form," on page 24](#)
- ♦ [Section 3.3, "Configuring the Collection Data Form Launch Schedule," on page 24](#)
- ♦ [Section 3.4, "Launching the Collection Data Form Using a Quick Task," on page 28](#)
- ♦ [Section 3.5, "Deploying the Data Collection Form Using a Device Task," on page 28](#)

3.1 Configuring the Collection Data Form

When you configure the Collection Data Form, you are selecting what information you want to gather from the workstation user. The Collection Data Form is not configured by default. It must be configured before it can be deployed.

You can define the Collection Data Form at three levels:

- ♦ **Management Zone:** The settings are inherited by all device folders and devices. To configure the Collection Data Form for the Management Zone, see [Section 3.1.1, "Configuring the Collection Data Form for the Management Zone," on page 22](#).
- ♦ **Device Folder:** The settings are inherited by all devices in the folder. Overrides the settings at the Management Zone level. To configure the Collection Data Form for a folder, see [Section 3.1.2, "Configuring the Collection Data Form for Devices in a Folder," on page 23](#).
- ♦ **Device:** The settings apply only to the device for which they are configured. Overrides the settings at the folder and Management Zone levels. To configure the Collection Data Form at the device level, see [Section 3.1.3, "Configuring the Collection Data Form for a Device," on page 23](#).

NOTE: If you are configuring the Collection Data Form settings on a device, you need to click **Override Settings** before you can change the system settings.

After it is configured and deployed, the Collection Data Form appears on the desktop of a managed device and prompts the workstation user to respond to a list of predefined questions.

For more information, see the following topics:

- ♦ [Section 3.1.1, "Configuring the Collection Data Form for the Management Zone," on page 22](#)
- ♦ [Section 3.1.2, "Configuring the Collection Data Form for Devices in a Folder," on page 23](#)
- ♦ [Section 3.1.3, "Configuring the Collection Data Form for a Device," on page 23](#)

3.1.1 Configuring the Collection Data Form for the Management Zone

- 1 In Endpoint Management Console, click **Configuration**.
- 2 In the Management Zone Settings panel, click **Inventory**.
- 3 In the **Category** list, click **Collection Data Form**.
- 4 Specify any explanatory text for the workstation user in the **Introductory Text** field.
- 5 (Optional) If you want the Collection Data Form to be available to the workstation user to run at anytime, select **Show in Endpoint Management Icon Menu**.
- 6 (Optional) Select **Show Cancel button on form** if you want to allow the workstation user to opt out of the process.
- 7 (Optional) Select **Invisible mode for autofill only** to populate the form with the autofill data. The form is hidden from the workstation user.
- 8 Select the data you want to gather, and configure how the workstation user can respond:

Label: Displays the name of the data you're collecting, such as First Name.

Data Type: Specifies the data type: character, integer, decimal, or date.

Display: Displays the specified field on the Collection Data Form that is sent to the workstation user.

Editable: Enables the user to enter or edit a response in the specified field rather than being forced to accept the default value.

Required: Makes the response required. If a field is required, workstation users cannot submit the form until they enter the required data.

Autofill: Shows whether **Autofill** is on or off. Click **No** (or **Yes**, as appropriate) to open the Autofill dialog box, where you can specify a registry key or environment variable to populate the **Collection Data Form** field with the data that the registry key or variable points to, such as HKLM\SYSTEM\CurrentControlSet\Services\Eventlog\ComputerName for this registry key, or WinDir for this environment variable. You can also use a registry key with a space in it, such as HKEY_CURRENT_USER\Control Panel\Screen Saver.Stars\Density.

When the auto-fill field is empty, and if the editable field is enabled then user entered value is not considered.

While specifying for the autofill information for registry keys, you can either specify the short name or the complete key name.

For example, "HKCR" or "HKEY_CLASSES_ROOT", "HKCU" or "HKEY_CURRENT_USER", "HKLM" or "HKEY_LOCAL_MACHINE", "HKUSR" or "HKEY_USERS", "HKCF" or "HKEY_CURRENT_CONFIG".

Default: Specify any value you want to use as a default value.

Choice List: If there is more than one possible response, click **Edit** and specify the available responses. You can also choose to allow the workstation user to create entries by selecting **Allow user created entries**.

Edit Mask: Allows you to restrict how a user enters a response by selecting a format from the list in the **Edit Mask** field. The choices are phone, time, and currency.

Instructions: Add any instructions for the workstation user.

- 9 Click **Apply** or **OK**, or click **Reset** to revert to previous settings.

NOTE: You can also create custom fields, called administrator-defined fields, to gather additional data. For more information, see [Chapter 4, “Using Administrator-Defined Fields,” on page 29](#).

3.1.2 Configuring the Collection Data Form for Devices in a Folder

- 1 In Endpoint Management Console, click **Devices**.
- 2 In the Devices panel, click **Details** next to the folder whose devices you want to configure.
- 3 Click the **Settings** tab.
- 4 In the Settings panel, click **Inventory**.
- 5 In the Category panel, click **Collection Data Form**.
- 6 Click **Override settings**.

This overrides the Management Zone settings for these devices.

- 7 In the **Introductory Text** field, specify information to configure the Collection Data Form.

For configuring the Collection Data Form, perform steps from [Step 4 on page 22](#) through [Step 9 on page 23](#) listed in [Section 3.1.1, “Configuring the Collection Data Form for the Management Zone,” on page 22](#).

3.1.3 Configuring the Collection Data Form for a Device

- 1 In Endpoint Management Console, click **Devices**.
- 2 Click the **Managed** tab.
- 3 Click the folder that contains the device you want to configure.
- 4 Click the device.
- 5 Click the **Settings** tab.
- 6 In the Settings panel, click **Inventory**.
- 7 In the Catalog panel, click **Collection Data Form**.
- 8 Click **Override settings**.

This overrides the Management Zone and folder settings for this device.

- 9 In the **Introductory Text** field, specify information to configure the Collection Data Form.

For configuring the Collection Data Form, perform steps from [Step 4 on page 22](#) through [Step 9 on page 23](#) listed in [Section 3.1.1, “Configuring the Collection Data Form for the Management Zone,” on page 22](#).

3.2 Deploying the Collection Data Form

There are four ways you can deploy the Collection Data Form to a workstation:

- ♦ **Collection Data Form Schedule:** Using the Collection Data Form schedule deploys the form to all the workstations in the Management Zone. For more information, see [Section 3.3, “Configuring the Collection Data Form Launch Schedule,”](#) on page 24.
- ♦ **Device Quick Task:** Using a device Quick Task deploys the Data Collection Form to one or more workstation in a folder. For more information, see [Section 3.4, “Launching the Collection Data Form Using a Quick Task,”](#) on page 28.
- ♦ **Device Task:** Using a device task deploys the Data Collection Form to a specified workstation. For more information, see [Section 3.5, “Deploying the Data Collection Form Using a Device Task,”](#) on page 28.
- ♦ **Scheduled as part of an inventory scan:** Using the inventory scan schedule deploys the Collection Data Form to all the workstations in the Management Zone. For more information, see [Section 2.1, “Configuring an Inventory Scan,”](#) on page 9.

3.3 Configuring the Collection Data Form Launch Schedule

NOTE: If you selected **Show in Agent Tray Icon Menu** on the Collection Data Form configuration page, the Collection Data Form is always available to the workstation user to run at anytime. For more information, see [Section 3.1, “Configuring the Collection Data Form,”](#) on page 21.

You can define the schedule at three levels:

- ♦ **Management Zone:** The settings are inherited by all device folders and devices. To schedule the deployment of the Data Collection Form for the Management Zone, see [Section 3.3.1, “Configuring the Collection Data Form Launch Schedule for the Management Zone,”](#) on page 24.
- ♦ **Device Folder:** The settings are inherited by all devices in the folder. Overrides the settings at the Management Zone level. To schedule the deployment of the Data Collection Form for a device folder, see [Section 3.3.2, “Scheduling the Deployment of the Collection Data Form for Devices in a Folder,”](#) on page 27.
- ♦ **Device:** The settings apply only to the device for which they are configured. Overrides the settings at the Management Zone level. To schedule the deployment of the Data Collection Form for a device, see [Section 3.3.3, “Scheduling the Deployment of the Collection Data Form for a Device,”](#) on page 27.

3.3.1 Configuring the Collection Data Form Launch Schedule for the Management Zone

- 1 In Endpoint Management Console, click **Configuration**.
- 2 In the Management Zone Settings panel, click **Inventory > Collection Data Form Schedule**.
- 3 In the **Schedule Type** field, select the type of schedule you want to use to send out the Collection Data Form. You can select from the following options:

No Schedule: No deployment is scheduled. See [“No Schedule”](#) on page 25.

Date Specific: The Collection Data Form is deployed on specified dates. See [“Date Specific” on page 25](#).

Recurring: The Collection Data Form is deployed on a recurring schedule. See [“Recurring” on page 25](#).

No Schedule

- 1 Select **No Schedule** in the **Schedule Type** field.
- 2 Click **Apply** or **OK**.

The Collection Data Form is not scheduled to deploy.

Date Specific

To deploy the Collection Data Form on a specified date:

- 1 Select **Date Specific** in the **Schedule Type** field.
- 2 Click the + icon to the right of the **Start Date(s)** field to open a calendar, then select a date. To select more than one date, click the + icon again. Click the - icon to delete a selected date.
- 3 (Optional) Select **Run event every year** to deploy the Collection Data Form annually on the dates you selected.
- 4 (Optional) For some reason, if the event does not run on the schedule you configured, to trigger the event immediately, select **Process immediately if device unable to execute on schedule**.
- 5 Select whether you want to deploy the Collection Data Form at a specified time or at a random time between specified start and end times.
- 6 Specify a start time, and if you selected **Start at a random time between Start Time and End Time**, specify an end time.
- 7 (Optional) Select **Use Coordinated Universal Time (UTC)**. Recommended, if the management zone is across geographical locations.
- 8 Click **Apply** or **OK**.

Recurring

Select whether you want to deploy the Collection Data Form when a device is refreshed, on certain days of the week, monthly, or at a fixed interval.

To deploy the Collection Data Form when a device is refreshed:

- 1 Select **Recurring** in the **Schedule Type** field.
- 2 Select **When a device is refreshed**.
- 3 (Optional) If you want to delay deploying the Collection Data Form for a set time after a refresh, select **Delay execution after refresh** and specify the time in days, hours, and minutes.
- 4 Click **Apply** or **OK**.

To deploy the Collection Data Form on certain days of the week:

- 1 Select **Recurring** in the **Schedule Type** field.
- 2 Select **Days of the week**.

- 3 Select the days on which you want to deploy the Collection Data Form.
- 4 In the **Start Time** field, specify the time you want to deploy the Collection Data Form.
- 5 Click **More Options**.
- 6 (Optional) For some reason, if the event does not run on the schedule you configured, to trigger the event immediately, select **Process immediately if device unable to execute on schedule**.
- 7 (Optional) Select Use Coordinated Universal Time (UTC). Recommended, if the management zone is across geographical locations.
- 8 (Optional) If you want to deploy the Collection Data Form at a random time between a specified start and end time, select **Start at a random time between Start Time and End Time**, then specify an end time.
- 9 (Optional) If you want to restrict the deployment of the Collection Data Form to a certain date range, select **Restrict schedule execution to the following date range**, then specify the start and end dates.
- 10 Click **Apply** or **OK**.

To deploy the Collection Data Form monthly:

- 1 Select **Recurring** in the **Schedule Type** field.
- 2 Select **Monthly**.
- 3 Select either **Day of the month** and specify a number between 1 and 31, **Last day of the month**, or select the configurable field where you can choose a combination of days of the month for a recurring schedule.
- 4 In the **Start Time** field, specify the time you want to deploy the Collection Data Form.
- 5 Click **More Options**.
- 6 (Optional) For some reason, if the event does not run on the schedule you configured, to trigger the event immediately, select **Process immediately if device unable to execute on schedule**.
- 7 (Optional) Select Use Coordinated Universal Time (UTC). Recommended, if the management zone is across geographical locations.
- 8 (Optional) If you want to deploy the Collection Data Form at a random time between a start and end time, select **Start at a random time between Start Time and End Time**, then specify an end time.
- 9 (Optional) If you want to restrict the deployment of the Collection Data Form to a certain date range, select **Restrict schedule execution to the following date range**, then specify the start and end dates.
- 10 Click **Apply** or **OK**.

To send out the Collection Data Form at a fixed interval:

- 1 Select **Recurring** in the **Schedule Type** field.
- 2 Select **Fixed Interval**.
- 3 Specify the number of months, weeks, days, hours, and minutes in their respective fields.
- 4 Specify a start date and time.
- 5 Click **More Options**.
- 6 (Optional) For some reason, if the event does not run on the schedule you configured, to trigger the event immediately, select **Process immediately if device unable to execute on schedule**.

- 7 (Optional) Select Use Coordinated Universal Time (UTC). Recommended, if the management zone is across geographical locations.
- 8 (Optional) If you want to restrict the deployment of the Collection Data Form to a certain date range, select **Restrict schedule execution to the following date range**, then specify an end date and end time.
- 9 Click **Apply** or **OK**.

3.3.2 Scheduling the Deployment of the Collection Data Form for Devices in a Folder

- 1 In Endpoint Management Console, click **Devices**.
- 2 Click **Details** next to the folder whose devices you want to configure.
- 3 Click the **Settings** tab.
- 4 In the Settings panel, click **Inventory > Collection Data Form Schedule**.
- 5 Click **Override settings**.
This overrides the Management Zone settings.
- 6 In the **Schedule Type** field, configure the schedule you want to use.
For configuring the schedule type, see [Configuring the Collection Data Form Launch Schedule for the Management Zone](#).

3.3.3 Scheduling the Deployment of the Collection Data Form for a Device

- 1 In Endpoint Management Console, click **Devices**, then click the **Managed** tab.
- 2 Click the folder containing the device you want to configure a schedule for.
- 3 Click the device.
- 4 Click the **Settings** tab.
- 5 In the Settings panel, click **Inventory**.
- 6 In the Catalog list, click **Collection Data Form Schedule**.
- 7 In the Inventory panel, click **Override settings**.
This overrides both the Management Zone and folder settings.
- 8 In the **Schedule Type** field, configure the schedule you want to use.
For configuring the schedule type, see [Section 3.3.1, “Configuring the Collection Data Form Launch Schedule for the Management Zone,” on page 24](#).

3.4 Launching the Collection Data Form Using a Quick Task

Using a device Quick Task deploys the Collection Data Form to one or more devices in a folder.

To deploy the Collection Data Form using a device Quick Task:

- 1 In Endpoint Management Console, click **Devices**.
- 2 Click the folder containing the device you want to inventory.
- 3 Select the device or devices you want to inventory.
- 4 Click **Quick Tasks > Inventory Wizard**.

The Quick Task Status dialog box shows the progress of the deployment. When complete, the Collection Data Form appears on the screen of the device or devices. You can stop the deployment by selecting the workstation and clicking **Stop**.

- 5 Click **Hide** to close the dialog box.

3.5 Deploying the Data Collection Form Using a Device Task

Using a device task deploys the Collection Data Form to a specified workstation.

To deploy the Collection Data Form using a device task:

- 1 In Endpoint Management Console, click **Devices**.
- 2 Click the folder containing the device you want to inventory.
- 3 Click the device you want to inventory.
- 4 In the **Device Tasks** list, click **Device Inventory Wizard**.

The Quick Task Status dialog box shows the progress of the deployment. When complete, the Collection Data Form appears on the screen of the device. You can stop the deployment by selecting the workstation and clicking **Stop**.

- 5 Click **Hide** to close the dialog box.

4 Using Administrator-Defined Fields

The following sections provide information about OpenText™ Endpoint Management features and procedures for administrator-defined fields.

- ♦ [Section 4.1, “About Administrator-Defined Fields,” on page 29](#)
- ♦ [Section 4.2, “Creating an Administrator-Defined Field,” on page 29](#)
- ♦ [Section 4.3, “Removing Administrator-Defined Fields from Web Console Reports,” on page 31](#)

4.1 About Administrator-Defined Fields

Administrator-defined fields allow you to add custom fields to inventory data. There are four types of fields:

- ♦ **User:** Used for gathering demographic data about the workstation user through the Collection Data Form.
- ♦ **Workstation:** Used for gathering demographic data about the workstation through the Collection Data Form.
- ♦ **Component:** Used for defining inventory data about a component.
- ♦ **Product:** Used for defining inventory data about a product.

The Administrator-Defined Fields panel shows the type of field and the number of defined values. When you create a **User** or **Workstation** field, it appears on the Collection Data Form as a field for workstation users to fill out. **Component** and **Product** field values are added to the properties of the component or product. You can change the field value of an individual component or product by performing a product or component search, clicking the product or component, and editing the field value on the Product Details page. For more information, see [Chapter 6, “Managing Component Data,” on page 41](#) and [Chapter 7, “Managing Product Data,” on page 43](#).

4.2 Creating an Administrator-Defined Field

Regardless of the type of administrator-defined field you want to create, the steps are the same, whether it is a **User**, **Workstation**, **Component**, or **Product** field.

- 1 In Endpoint Management ConsoleEndpoint Management Console, click **Configuration**, then click the **Asset Inventory** tab.
- 2 In the Administrator-Defined Fields panel, click the type of field you want to create: **User**, **Workstation**, **Component**, or **Product**.

The User Fields panel shows existing defined fields, along with the following information:

Name: The name of the field.

Data Type: The data type: character, integer, decimal, or date.

The date format depends on the Endpoint Management Console location that is used.

For instance:

- ♦ If you login using English, you need to enter date in the MM/DD/YYYY format
- ♦ If you login using French, you need to enter date in the DD/MM/YYYY format
- ♦ If you login using Chinese, you need to enter date in the YYYY-MM-DD format

Size: The number of alphanumeric characters. This applies only to character-type fields.

Edit Type: Specifies how the user enters a response. The values are **Edit**, **List**, and **Combo**.

Default Value: The value that is specified when the field is created.

Internal Name: The field's internal ID.

3 Click **New**.

4 Specify the following fields:

Type: Filled in by default depending on the type of field you selected.

Name: Name of the administrator-defined field. This field is required.

Default Value: The default value of the field.

Data Type: **Character**, **Integer**, **Decimal**, or **Date**. If you choose Date as the data type, then you need to enter the date in the MM/DD/YYYY format.

Size: The maximum number of alphanumeric characters allowed in the field. This applies only to character-type fields.

Edit Type: Allows greater flexibility in entering and selecting field values. There are three options:

- ♦ **Edit:** Allows the user to enter a value or edit the default value.
- ♦ **List:** Allows the user to select a value from a list of possible choices.
- ♦ **Combo:** Allows the user to enter a value or select from a list.

Edit Mask: Select a format from the **Edit Mask** field list to restrict how a value is entered. The choices are phone, time, and currency. This applies only to character-type fields.

5 Click **Next**.

6 If you chose **List** or **Combo** as the **Edit Type** in [Step 4 on page 30](#), specify a list of choice values and click **Next**.

6a Specify a value in the **Choice List Values** field.

6b Click **Add**. Repeat for additional values.

6c Repeat [Step 6a on page 30](#) and [Step 6b on page 30](#) for additional values.

6d (Optional) Select a value and click **Edit** to change it.


6e (Optional) Select a value and click **Remove** to remove it.

6f (Optional) Import a list of values by clicking **Import** and specifying a file in the **Import File** field.

7 Click **Finish** to create the new field.

4.3 Removing Administrator-Defined Fields from Web Console Reports

Deleting an administrator-defined field does not remove references from the Web console report definition. You must remove the references manually.

- 1 Log in to Endpoint Management Console and select the report to be removed.
- 2 In the Custom Report Definition Summary page, click **Edit**.
- 3 From the Available list in the right panel, click the administrator-defined field to select it.
- 4 Click  to remove the selected administrator-defined field reference.
- 5 Click **Save** to save the report definition.

5 Using Reports

Reports allow you to view and analyze inventory data from your Management Zone. Endpoint Management Console includes predefined reports you can run along with reports you can customize. This section includes the following topics:

- ♦ [Section 5.1, “Using Inventory Standard Reports,” on page 33](#)
- ♦ [Section 5.2, “Using Inventory Custom Reports,” on page 35](#)
- ♦ [Section 5.3, “Running an Inventory Report,” on page 39](#)

Hotfixes collected by OpenText™ Endpoint Management are retrieved by using various ways such as registry and WIM queries. Hence, more number of Hotfixes are shown by Endpoint Management when compared to the Hotfixes shown by Microsoft through the Control Panel.

NOTE: Microsoft provides multiple sources for Hotfixes that reports more than those displayed in the Control Panel.

5.1 Using Inventory Standard Reports

Standard or predefined reports scan your inventory data and arrange the data according to the report configuration. More information is available in the following topics:

- ♦ [Section 5.1.1, “Available Standard Reports,” on page 33](#)
- ♦ [Section 5.1.2, “Running a Standard Report,” on page 35](#)

5.1.1 Available Standard Reports

Endpoint Management Console includes several predefined reports you can use to analyze the inventory in your Management Zone. These reports are grouped into folders according to their function. The available folders and reports are as follows:

- ♦ **Device Lists:** Reports focusing on device details.
 - ♦ **Devices by Machine / Login Name:** Lists all devices by machine and login name.
 - ♦ **Devices by Mfg / Model:** Shows a count of systems by manufacturer and model.
 - ♦ **Devices with Virtual Machines:** Shows devices with host virtual machines that have been scanned.
 - ♦ **Duplicate Asset Tags:** Shows devices with duplicate asset tags.
 - ♦ **Duplicate Machine Names:** Shows devices with duplicate machine names.
 - ♦ **Duplicate Serial Numbers:** Shows devices with duplicate serial numbers.

The number of installations displayed on the report might not match with the count of workstations, as there might be multiple components with the same product ID for a single workstation and on drill down, unique values will be displayed.

- ♦ **Software Applications:** Reports focusing on software applications.
 - ♦ **Antivirus/AntiSpyware Details:** Shows antivirus/antispyware definition files with links to the devices where they are installed.
 - ♦ **Software Applications by Category:** Shows a count of installed software products grouped by category and subcategory.
 - ♦ **Software Applications by Manufacturer:** Shows a count of installed products grouped by manufacturer.
 - ♦ **Software Applications by OS and Product:** Shows a count of installed products grouped by operating system and product name.
 - ♦ **Duplicate Serial Numbers:** Shows software products that have multiple instances of the same serial number.
 - ♦ **High Bandwidth Applications:** Shows a count of high-bandwidth products, such as multimedia and file-sharing software.
 - ♦ **Hot Fix Details:** Shows hot fixes and security patches with links to descriptions of the fixes and patches and the machine that they were installed on.
 - ♦ **Microsoft Products:** Shows a count of installed Microsoft products grouped by classifications specific to Microsoft.
 - ♦ **Operating Systems:** Shows a count of devices grouped by the installed operating system.
 - ♦ **OS Service Packs:** Shows a count of devices grouped by operating system and service pack.
- ♦ **Hardware Components:** Reports focusing on hardware data.
 - ♦ **BIOS:** Shows installed versions and release dates grouped by manufacturer.
 - ♦ **Hardware Components by Category:** Shows a count of installed hardware products by category and subcategory.
 - ♦ **Hardware Components by Manufacturer:** Shows a count of installed hardware products grouped by manufacturer.
 - ♦ **Disk Space:** Shows a count of devices with total disk space within a specific range.
 - ♦ **Duplicate Serial Numbers:** Shows hardware products with the same serial number.
 - ♦ **Free Disk Space:** Shows a count of devices with free disk space within specific ranges.
 - ♦ **Memory Size:** Shows a count of devices grouped by RAM size.
 - ♦ **Processors:** Shows a count of devices grouped by CPU speed.
- ♦ **Upgrade Readiness:** Reports that help you determine which devices are ready for an upgrade.
 - ♦ **Memory Upgrade:** Lists devices along with data on memory and available slots.
 - ♦ **Windows 11 Ready:** Lists devices along with data showing whether the device is not ready or not for Windows 11 upgrade.

NOTE: ♦ It is recommended not to modify the default filters in the Windows 11 readiness report. The filter values are prerequisites for the Windows 11 upgrade, as suggested by Microsoft.

5.1.2 Running a Standard Report

- 1 In Endpoint Management Console, click **Reports**.
- 2 In the Inventory Standard Reports panel, click the folder containing the report you want to run.
Reports are listed by name and description. For a list of reports and descriptions, see [Section 5.1.1, “Available Standard Reports,” on page 33](#).

- 3 (Optional) Select how you want to filter your search.

You can limit the scope of the report data by any of the following:

- ♦ **Zone:** Select **Zone** to collect data from the entire Management Zone.
- ♦ **Folder:** Select **Folder** and specify a folder name to gather data about that folder.
- ♦ **Group:** Select **Group** and specify a group name to gather data about that group.
- ♦ **Demographic:** Select **Demographic**, then select the criteria you want to use to filter the data.

- 4 Click a report to run it.

Click the various links on the report for additional information. You can export the report to an Excel, CSV, or PDF format by clicking the corresponding link. In some reports, you can also click **Graph** to view the data in a bar graph, pie chart, or line graph format.

5.2 Using Inventory Custom Reports

Endpoint Management Console allows you to create and run custom reports that you can use to analyze the inventory in your Management Zone.

These sections provide more information:

- ♦ [Section 5.2.1, “Available Custom Reports,” on page 35](#)
- ♦ [Section 5.2.2, “Running a Custom Report,” on page 36](#)
- ♦ [Section 5.2.3, “Creating a Custom Report,” on page 37](#)
- ♦ [Section 5.2.4, “Editing a Custom Report,” on page 38](#)
- ♦ [Section 5.2.5, “Moving a Custom Report,” on page 38](#)
- ♦ [Section 5.2.6, “Deleting a Custom Report or Folder,” on page 38](#)
- ♦ [Section 5.2.7, “Importing New Report Definitions,” on page 39](#)

5.2.1 Available Custom Reports

Endpoint Management Console includes several predefined reports you can use to analyze the inventory in your Management Zone. These reports are grouped into folders according to their function. The available folders and reports are as follows:

- ♦ **Hardware Components:** Reports focusing on hardware components, such as BIOS and system details.
 - ♦ **BIOS and System Details:** Shows the BIOS details for all current systems.

- ♦ **Hardware added or deleted in last 6 months:** Lists the hardware components in the Management Zone and shows the number of additions and deletions over the previous 6 months.
- ♦ **USB devices added in last 30 days:** Shows the workstations that have had a USB device added in the previous 30 days.
- ♦ **Workstations with memory deletions in last 30 days:** Shows the workstations that have had memory module deletions during the previous 30 days.
- ♦ **Software Applications:** Reports focusing on software applications, such as how many applications were added during a specified time.
 - ♦ **SW apps added in last 30 days (by product):** Shows the software applications that were added during the previous 30 days, grouped by product.
 - ♦ **SW apps added in last 30 days (by workstation):** Shows the software applications that were added during the previous 30 days, grouped by workstation.
 - ♦ **SW apps deleted in last 30 days (by product):** Shows the software applications that were deleted during the previous 30 days, grouped by product.
 - ♦ **SW apps deleted in last 30 days (by workstation):** Shows the software applications that were deleted during the previous 30 days, grouped by workstation.
 - ♦ **Workstations with antivirus software:** Shows the Windows workstations (not marked as deleted) with antivirus software installed.
 - ♦ **Workstations with suspicious software installed:** Shows the workstations with suspicious software installed.
 - ♦ **Workstations without antivirus software:** Shows the Windows workstations (not marked as deleted) without antivirus software installed.
- ♦ **Systems:** Reports focusing on system details, such as how many systems were added during a specified time.
 - ♦ **Hosts of Virtual Machines:** Shows the systems that are hosting virtual machines.
 - ♦ **Systems added in last 90 days:** Shows the systems (Windows, UNIX/Linux) that were added to the inventory database during the last 90 days.
 - ♦ **Systems deleted in last 90 days:** Shows the systems (Windows, UNIX/Linux) that were deleted during the previous 90 days.
 - ♦ **Systems that have not loaded results in 90 days:** Shows the systems (Windows, UNIX/Linux) that have not been marked as deleted and have not loaded scan results during the previous 90 days.
 - ♦ **Systems with less than 100 MB free space:** Shows the systems (Windows, UNIX/Linux) that have not been deleted and have less than 100MB free disk space.
 - ♦ **Systems with less than 128 MB memory:** Shows the systems (Windows, UNIX/Linux) that have not been deleted and have less than 128MB total memory.
 - ♦ **Virtual Machines:** Shows the virtual machines in your Management Zone.

5.2.2 Running a Custom Report

- 1 In Endpoint Management Console, click **Reports**.
- 2 In the Inventory Custom Reports panel, click the folder containing the report you want to run.

The number of reports in each folder is shown in the **Report Count** column.

3 Click a report.

4 Click **Run** in the lower left corner.

On the report page, click the various links on the report for additional information. You can export the report to an Excel, CSV, or PDF format by clicking the corresponding link.

5.2.3 Creating a Custom Report

1 In Endpoint Management Console, click **Reports**.

2 In the Inventory Custom Reports panel, click the folder where you want to save the report, or create a new folder by clicking **New**, specifying a folder name, then clicking **OK**.

3 Click **New**.

4 Specify a name in the **Name** field.

5 Select the report type. The types are:

- ♦ Devices
- ♦ Software Applications
- ♦ Software Files
- ♦ Hardware Components
- ♦ License Management

6 Select the focus of the report. The options are:

- ♦ Basic Device Attributes
- ♦ Product Filtering
- ♦ File Filtering
- ♦ History

7 Click **Continue**.

8 Fill in the following fields:

Name: Specify the name of the report.

Folder: Select a folder where you want to save the report.

Description: Specify a description for your report.

Type: This field is display only. It shows the report type you selected.

Columns: From the list on the left, select what data you want to include in your report. Use the arrow icons to move the selected data to the list on the right. Use Ctrl+click to select more than one option at a time. Use the up and down icons to arrange how you want the data displayed.

Criteria: Select your filter criteria in the **Field**, **Operator**, and **Value** fields. Use the + icons to add filters; click the - icon to delete a filter. Click **OR** or **AND** to toggle back and forth between the two operators.

Summary Criteria: Select your summary filter criteria in the **Field**, **Operator**, and **Value** fields. Use the + icons to add filters; click the - icon to delete a filter. Click **OR** or **AND** to toggle back and forth between the two operators

9 Click **Save**.

5.2.4 Editing a Custom Report

- 1 In Endpoint Management Console, click **Reports**.
- 2 In the Inventory Custom Reports panel, click the folder containing the report you want to edit.
- 3 Click the report.
- 4 Click **Edit** in the lower left corner.
- 5 Edit the following fields:
 - Name:** The name of the report.
 - Folder:** The folder where you want to save the report.
 - Description:** The description for your report.
 - Type:** This field is display only. It shows the report type you selected.
 - Columns:** From the list on the left, select what data you want to include in your report. Use the arrow icons to move the highlighted data selection to the list on the right. Use Ctrl-click to select more than one option at a time. Use the up and down icons to arrange how you want the data displayed.
 - Criteria:** Select your filter criteria in the **Field**, **Operator**, and **Value** fields. Use the + icons to add filters; click the - icon to delete a filter. Click **OR** or **AND** to toggle back and forth between the two operators.
 - Summary Criteria:** Select your summary filter criteria in the **Field**, **Operator**, and **Value** fields. Use the + icons to add filters; click the - icon to delete a filter. Click **OR** or **AND** to toggle back and forth between the two operators.
- 6 Click **Save**.

5.2.5 Moving a Custom Report

- 1 In Endpoint Management Console, click **Reports**.
- 2 In the Inventory Custom Reports panel, click the folder containing the report or reports you want to move.
- 3 Select the report or reports you want to move.
- 4 Click **Edit > Move**.
- 5 Select a new folder location.
- 6 Click **OK**.

5.2.6 Deleting a Custom Report or Folder

To delete a custom report:

- 1 In Endpoint Management Console, click **Reports**.
- 2 In the Inventory Custom Reports panel, click the folder containing the report you want to delete.
- 3 Select the report you want to delete.
- 4 Click **Delete**.

To delete a folder:

- 1 In Endpoint Management Console, click **Reports**.
- 2 In the Inventory Custom Reports panel, select the folder you want to delete.
- 3 Click **Delete**.

WARNING:

- ♦ Deleting a folder deletes all the reports in that folder.
-

5.2.7 Importing New Report Definitions

You can import inventory reports into Endpoint Management Console. You can also re-import reports that have been exported by Endpoint Management Console. A predefined XML format is needed for import.

To import report definitions:

- 1 In Endpoint Management Console, click **Reports**.
- 2 In the Inventory Custom Reports panel, click **Action > Import New Report Definition**.
- 3 Specify the file in the **Query import file** field, or click **Browse** to search.
- 4 Click **Import**.

5.3 Running an Inventory Report

You can run a single or multiple Inventory reports simultaneously. Once you run any specific Inventory report and navigate to the Summary page for that report, the following screen is displayed:

Devices		Run Date: 01/10/2025					
1 to 100 of Many Device(s)							
Machine name	Login name	Primary User	Entered User	MAC Address	IPv4 Address	IPv6 Address	Asset Tag
0ccis002	NHS			6045BD108ABC	10.96.93.21		7783-7084-3265-9085-8269-3286-77
6000-13640	Administrator			C400AD96E3B7	10.179.77.122		Default string
6000-13674	Zeiss			C400AD96D675	10.179.165.167		Default string
ccqws7z1ggnl	RXCP001		Sussex, RXC-VitalPAC-001 (East	f0766f19eede			
ccqws7zmgnl	RXCP002		Sussex, RXC-VitalPAC-002 (East	f0766f15b96e			
ccqws7zvgnl	RXCP001		Sussex, RXC-VitalPAC-001 (East	f0766f1c42ff			
ccqws832ggnl	RXCP001		Sussex, RXC-VitalPAC-001 (East	f0766f15c543			
ccqws872ggnl	RXCP001		Sussex, RXC-VitalPAC-001 (East	f0766f1bc314			
ccqws884ggnl	RXCP001		Sussex, RXC-VitalPAC-001 (East	f0766f187cb1			
ccqws8d2ggnl	RXCP002		Sussex, RXC-VitalPAC-002 (East	f0766f1bce6b			
ccqws8dbgnl	RXCP001		Sussex, RXC-VitalPAC-001 (East	f0766f15c914			
ccqws8efggnl	RXCP002		Sussex, RXC-VitalPAC-002 (East	f0766f1c422a			
ccqws8j2ggnl	RXCP002		Sussex, RXC-VitalPAC-002 (East	f0766f1ca66a			

- ♦ The **Many** option is displayed for the report counts on the Reports Summary page. You can click the **Many** option to view the total report count.

NOTE: Standard reports having Installations column (for example, Devices By Mfg / Model) will not have **Many** option. These standard reports display the total report count directly, as Memory optimization changes are not implemented for these aggregated reports.

- ♦ The pagination is not displayed on the Reports Summary page. You need to click **Next** after clicking **Many** to see the pagination.

Devices Run Date: 01/10/2025

4944 to 5043 of 8997 Device(s)

< Previous 100 Next 100 >

Machine name	Login name	Primary User	Entered User	MAC Address	IPv4 Address	IPv6 Address	Asset Tag
rac27615	East Sussex Healthcare NHS Trust			025041000001	10.37.85.203	2a00:23ee:2940:3f56:28b4:b0ed:cb73:ad05	
rac27616	CurryA001			84808154525C	192.0.0.1	2a00:23ee:2180:c60:ae25:ba3:900d:3989	
rac27617	HowdenE			888987445E44	169.254.86.224	2a00:23ee:2948:7a3f:e8bbddcb:99e5:d98e	
rac27618	PriorT			84B5885A465E	169.254.217.36	2a00:23ee:1958:44b4:ed6e:a8e1:dcfd:dcdb	
rac27619	FrancisD002			9CB59B45C950	192.0.0.1	2a00:23ee:10a0:855e:485a:f592:a888:c353	
rac27620	East Sussex Healthcare NHS Trust			78AF08A83538	10.96.52.238	2a00:23ee:18a8:12fb:3363:fe3e:d796:9ef1	
rac27621	East Sussex Healthcare NHS Trust			78AF08ACCEFC	10.96.190.212		
rac27622	East Sussex Healthcare NHS Trust			3C219CD03914	10.96.191.189		
rac27623	castroy			78AF08AC2EE3	10.179.161.129		
rac27625	BrownC016			3C219CD042DD	10.96.52.162		
rac27626	East Sussex Healthcare NHS Trust			7C57588526CE	10.179.5.122	2a00:23c6:30a8:6901:ec10:8d80:707b:54f	
rac27627	curtish001			3C219CD0424C	10.96.49.239		
rac27628	PrettyA			C025A5D5099F	10.179.10.53		
rac27629	EastonL			78AF08A9A312	192.168.1.206	2a00:23c6:30a1:d001:bffb:68b8:91c1:1965	
rac27630	kircherh001			78AF08AC671E	192.168.0.16	2a02:c7c:7c6e:7c00:76d5:8cef:7668:14d4	
rac27631	tukeic			C025A5D509AA	10.96.184.98		
rac27632	RossiterL			C025A5D509CD	10.179.1.100		
rac27633	HaazF			78AF08A99471	192.168.1.113		
rac27634	East Sussex Healthcare NHS Trust			3C219CD03162	192.168.0.52		
rac27635	East Sussex Healthcare NHS Trust			C025A5D5098E	10.96.184.115		
rac27636	East Sussex Healthcare NHS Trust			C025A5D508D7	10.96.184.206		
rac27637	East Sussex Healthcare NHS Trust			78AF08A985FD	192.168.1.96		
rac27638	rowlandg			78AF08AC3CE4	10.96.48.229		
rac27639	Halla			3C219CD0427E	10.96.191.78		

Excel Excel (All) CSV CSV (All) PDF PDF (All)

- When you click any file format to download, the file will be downloaded in the .zip format. This .zip file contains three files- a file with actual report format (.csv, .pdf, or excel), a logo file, and the Success or Failure properties file. These three files are created based on the report success/failure case.
 - Success.properties file is created if the total records are downloaded successfully without any issues.
 - Failure.properties is created if there is an error/exception during the download or in case of partial download.

These properties files will provide information about the actual record count and the time taken to download the report.

6 Managing Component Data

A component is a hardware or software product associated with a workstation, for example, a spreadsheet application or a network interface card. Endpoint Management Console allows you to list a workstation's components or find workstations with a particular component. After you locate the component, you can edit the component data, such as the product name and serial number. You can examine component data through component searches.

The following sections provide information about managing component data:

- ♦ [Section 6.1, "Searching for a Component and Viewing Component Data," on page 41](#)
- ♦ [Section 6.2, "Editing the Component Data," on page 42](#)

6.1 Searching for a Component and Viewing Component Data

Before you can view component data, you need to perform a component search. Component searches are done through the Component Search panel ([Configuration > Asset Inventory](#)).

The Component Search panel allows you to select filters and filter sets to search for a particular component, then lists the components along with the following information:

- ♦ **Machine Name:** The name of the machine that has the particular product.
- ♦ **Manufacturer:** The manufacturer of the product.
- ♦ **Product:** The name of the product.
- ♦ **Version:** The version of the product.
- ♦ **Category:** The product category.
- ♦ **Subcategory:** The product subcategory.

To search for a component and view component data:

- 1 In Endpoint Management Console, click [Configuration](#), then click the [Asset Inventory](#) tab.
- 2 In the Component Search panel, click [Add Filter](#) or [Add Filter Set](#), depending on the filtering model you want to use.
- 3 Select options for your filter.
For example, you could search by machine name or department.
- 4 (Optional) Create additional filters or filter sets.
- 5 Click [Search](#).

Components matching your search criteria are listed, along with additional information about the component.

6.2 Editing the Component Data

- 1 Search for a component, as shown in [Section 6.1, “Searching for a Component and Viewing Component Data,”](#) on page 41.
- 2 Click a product name to view the component details. To add new hardware or edit the serial number or asset tag of existing hardware, log in to the Inventory Collection Editor as an administrator from your managed device. For more information, see “Working with the Inventory Collection Editor” in the [Endpoint Management Agent Guide](#).

The Component Details panel opens, displaying the following details about the component, along with any administrator-defined fields:

- ♦ **Machine Name:** The name of the machine.
 - ♦ **Product:** The name of the product.
 - ♦ **Asset Tag:** The asset tag number.
 - ♦ **Serial Number:** The component’s serial number.
- 3 Click **Change Product** to open the Product Search window, where you can search for and select a new product name.
 - 4 Select your filter criteria, then click **Search**.
 - 5 Select a product from the list, then click **Select Product**.
 - 6 Edit the other fields as desired.
 - 7 Click **OK** or **Apply**.

6.2.1 Using Administrator-Defined Fields

You can add administrator-defined fields to the Component Details panel to show additional information about the component. For example, you could add a field called **Malfunctioning**, with a **Yes** or **No** choice selection to show the product’s working status. For more information on creating administrator-defined fields, see [Chapter 4, “Using Administrator-Defined Fields,”](#) on page 29.

7 Managing Product Data

A product is a piece of hardware or software identified by the manufacturer, product name, and model/version. Endpoint Management Console allows you to search for products, view details about the product, and classify products according to category and subcategory. The following sections provide more information about managing product data:

- ♦ [Section 7.1, “Searching for a Product and Viewing Product Data,” on page 43](#)
- ♦ [Section 7.2, “Reclassifying a Product,” on page 44](#)
- ♦ [Section 7.3, “Managing Product Categories and Subcategories,” on page 44](#)

7.1 Searching for a Product and Viewing Product Data

Before you can view product data, you need to perform a product search. Product searches are done through the Product Search panel ([Configuration > Asset Inventory](#)).

The Product Search panel allows you to select filters and filter sets to search for a particular product, then lists the product along with the following information:

- ♦ **Manufacturer:** The manufacturer of the product.
- ♦ **Product:** The name of the product.
- ♦ **Version:** The version of the product.
- ♦ **Category:** The product category.
- ♦ **Subcategory:** The product subcategory.

To search for a product and view product data:

- 1 In Endpoint Management Console, click [Configuration](#), then click the [Asset Inventory](#) tab.
- 2 In the Product Search panel, click [Add Filter](#) or [Add Filter Set](#), depending on the filtering model you want to use.
- 3 Select options for your filter.
For example, you could search by product category or type.
- 4 (Optional) Create additional filters or filter sets.
- 5 Click [Search](#).

Products matching your search criteria are listed, along with additional information about the product.

7.2 Reclassifying a Product

Products are classified by category and subcategory. To change product classification:

- 1 Search for a product as shown in [Section 7.1, “Searching for a Product and Viewing Product Data,” on page 43](#).
- 2 Click a product name to open the Product Details panel.
- 3 In the **Category/Subcategory** field, select a new category/subcategory pair.
For added flexibility, Endpoint Management Console allows you to create new category/subcategory pairs. For more information, see [Section 7.3, “Managing Product Categories and Subcategories,” on page 44](#).
- 4 Click **OK** or **Apply**.

7.3 Managing Product Categories and Subcategories

During an inventory scan, Endpoint Management Console uses a knowledgebase of thousands of products to identify scanned products. After they are identified, these products are classified by category and subcategory. For added flexibility, Endpoint Management Console allows you to reclassify products and create new product categories.

Categories and subcategories are managed through the Product Categories panel (**Configuration > Asset Inventory**). This panel displays the following information:

- ♦ **Category Type:** The product category, such as CPU or CD-ROM. These are predefined.
- ♦ **Category Name:** The name of the product category.
- ♦ **Source:** Specifies whether the category name is a default value (**Novell**) or a user-defined value (**Local**). Only **Local** categories can be edited or deleted.

The following sections provide more information about managing product categories and subcategories:

- ♦ [Section 7.3.1, “Creating a New Product Category,” on page 44](#)
- ♦ [Section 7.3.2, “Renaming a Product Category,” on page 45](#)
- ♦ [Section 7.3.3, “Deleting a Product Category,” on page 45](#)
- ♦ [Section 7.3.4, “Creating a New Product Subcategory,” on page 45](#)
- ♦ [Section 7.3.5, “Renaming a Product Subcategory,” on page 45](#)
- ♦ [Section 7.3.6, “Deleting a Product Subcategory,” on page 46](#)

7.3.1 Creating a New Product Category

- 1 In Endpoint Management Console, click **Configuration**, then click the **Asset Inventory** tab.
- 2 In the Product Categories panel, click **New**.
- 3 Select a category type in the **Category Type** field.
- 4 Specify a name in the **Category Name** field.

- 5 Click **OK**.

The new category is added to the category list with the source shown as **Local**. You can further define this category by assigning a subcategory. For more information, see [Section 7.3.4, “Creating a New Product Subcategory,”](#) on page 45.

7.3.2 Renaming a Product Category

- 1 In Endpoint Management Console, click **Configuration**, then click the **Asset Inventory** tab.
- 2 In the Product Categories panel, select the category you want to rename.
You can only rename categories whose source is **Local**.
- 3 Click **Edit > Rename**.
- 4 Specify a new name in the **Category Name** field.
- 5 Click **OK**.

7.3.3 Deleting a Product Category

- 1 In Endpoint Management Console, click **Configuration**, then click the **Asset Inventory** tab.
- 2 In the Product Categories panel, select the category you want to delete.
You can only delete categories whose source is **Local**.
- 3 Click **Delete**.

7.3.4 Creating a New Product Subcategory

Creating a subcategory further classifies a product.

- 1 In Endpoint Management Console, click **Configuration**, then click the **Asset Inventory** tab.
- 2 In the Product Categories panel, select a category that you want to create a subcategory for.
- 3 Click **Action > Manage Subcategories**.
The Product Subcategories panel appears, listing any predefined subcategories for the specified category, and the subcategory source, **Local** or **Novell**.
- 4 Click **New**.
- 5 Specify a name in the **Subcategory Name** field.
- 6 Click **OK**.

7.3.5 Renaming a Product Subcategory

- 1 In Endpoint Management Console, click **Configuration**, then click the **Asset Inventory** tab.
- 2 In the Product Categories panel, select the category whose subcategory you want to rename.
You can only rename subcategories whose source is **Local**.
- 3 Click **Action > Manage Subcategories**.
- 4 Select the category/subcategory pair.
- 5 Click **Edit > Rename**.

- 6 Specify a new name in the **Subcategory Name** field.
- 7 Click **OK**.

7.3.6 Deleting a Product Subcategory

- 1 In Endpoint Management Console, click **Configuration**, then click the **Asset Inventory** tab.
- 2 In the Product Categories panel, select the category whose subcategory you want to delete.
You can only delete subcategories whose source is **Local**.
- 3 Click **Action > Manage Subcategories**.
- 4 Select the category/subcategory pair you want to delete.
- 5 Click **Delete**.

8 Purge Inventory History

The obsolete inventory records can be deleted from the database. This process of deleting the inventory data is called purging the inventory history. In Endpoint Management Console, you can use the Purge Inventory History option available under inventory settings to purge the inventory records after a specific period of time.

In this section you will find information on the following:

- ♦ [Section 8.1, “Configuring Inventory History Purge Settings for the Zone,” on page 47](#)
- ♦ [Section 8.2, “Overriding Inventory History Purge Settings at the Device Level,” on page 48](#)

8.1 Configuring Inventory History Purge Settings for the Zone

The Purge Inventory History panel allows you to configure settings to delete the inventory history. You can remove records from the database for the products and components that were previously marked for deletion that is older than the value you set. By default, all the data is stored in the database unless this setting is configured. Purge schedule of the Zone is applicable to the devices as well.

- 1 In Endpoint Management Console, click the **Configuration** tab.
- 2 Click **Inventory** under **Management Zone Settings**.
- 3 Click **Purge Inventory History**.
- 4 Specify the following purge history settings:
 - ♦ **Remove the deleted products and components older than x day(s):** Specify the number of days after which to purge the deleted product and component data. The default value is 180 days.
 - ♦ **Remove the inventory history data older than x day(s):** Specify the number of days after which to purge the inventory history. The default value is 180 days.

Example 8-1 For example:

If you enter 190 days as the value, all data older than 190 days is deleted.

- 5 Click **Apply** or **OK** to save your settings. Click **Reset** to return to the default values.

8.2 Overriding Inventory History Purge Settings at the Device Level

You can configure inventory history purge settings for the selected device or server. These settings allow you to remove the inventory history and application usage data as necessary.

The Purge Inventory History panel allows you to configure settings to remove the inventory history. You can remove records from the database for the products and components that were previously marked for deletion that is older than the value you set. By default, all the data is stored in the database unless this setting is configured. Device level purging is based on the Zone level purging schedule.

1 In Endpoint Management Console, click the **Devices** tab.

2 Click **Servers** or **Workstations**.

If you are configuring the purge inventory history settings on a device folder or a device, you need to click **Override Settings** before you can change the system settings.

3 Click a server name or a device name.

4 On the Settings page, click **Purge Inventory History**.

5 Specify the following purge history settings:

- ♦ **Remove the deleted products and components older than x day(s):** Specify the number of days after which to purge the deleted product and component data. The default value is 180 days.
- ♦ **Remove the inventory history data older than x day(s):** Specify the number of days after which to purge the inventory history. The default value is 180 days.

Example 8-2 For example:

If you enter 190 days as the value, all data older than 190 days is deleted.

6 Click **Apply** or **OK** to save your settings. Click **Reset** to return to the default values.

A Inventory Workflow

- ♦ [Section A.1, “Inventory Workflow on a Device,” on page 49](#)

A.1 Inventory Workflow on a Device

For any scheduled inventory scan or user-initiated inventory scan, the collector performs the inventory scan and prepares the scanned file according to the collected data. The device then sends the file to the Endpoint server for further processing.

The collector places the following files:

`workstationguid-delta.xml`

`workstationguid-last.xml`

`workstationguid-full.xml`

in one of the following folders in the workstation:

On Windows devices: `<Install -path>\Endpoint Agent\work\inventory`

The `workstationguid-delta.xml` file displays only the current scan excluding the last scan. The `workstationguid-last.xml` file contains data related only to the current scan and the `workstationguid-full.xml` file includes complete details of all the scans so far.

The collector uploads only the delta file to the OpenText Configuration Management server while the other two files remain on the device and get updated during the next scan.

